



MANAGING APPOINTMENTS CHECKLIST

During the Appointment

FACT SHEET

Client Name: _____

Instructions: Staff to initial each area as completed. Write down any comments related to the completion of each task in the space provided. Forward or file completed checklist according to agency protocol.

Checking in and waiting area

- _____ 1. Check in; introduce yourself and the individual.
- _____ 2. State the reason you are there and encourage the individual to participate as able.
- _____ 3. Discuss accommodations needed in waiting room, such as a more private space.
- _____ 4. Provide information as requested such as insurance information and photo identification.
- _____ 5. Maintain a positive, supportive environment while waiting. Engage the individual in preferred activities as needed.
- _____ 6. If you need to leave waiting area, alert the receptionist and establish a method for him/her to contact you. Do not leave the individual alone in the waiting room.

In the examination room

- _____ 7. Provide any healthcare visit/consultation type form, other health related information, and review the reason for the appointment.
- _____ 8. Discuss any concerns or questions that you were asked to relay from other team members.
- _____ 9. Help the healthcare provider in communicating directly with the individual. Explain communication accommodations and approaches to the examination that may facilitate cooperation.
- _____ 10. Stay with the individual to provide support and assist with communication.
- _____ 11. Refer to a person in the provider agency, a guardian, or to written information if you do not know the answer to any of the healthcare provider's questions.



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- _____ 12. Discuss possible challenges with procedures or the examination with the healthcare provider.
- _____ 13. Assist with explanations and provide support for procedures or the examination. This may include providing diversions or requesting shorter, simpler events or steps with breaks in between.
- _____ 14. Help with transfer and positioning of the individual.
- _____ 15. If the exam/procedure is not completed, make sure the reason for not completing the exam/procedure is written on healthcare visit/consultation form along with written recommendations for future steps.
- _____ 16. DO NOT give verbal or written consent for invasive procedures - refer the healthcare provider to the guardian or healthcare representative if individual cannot give their own consent.
- _____ 17. Help to decide if the exam/procedure is worth doing in the event the individual expresses discomfort or resistance. If this occurs, refer the situation to the support team for review and discussion. Alert the healthcare provider of the need for discussion and request his/her input in writing.
- _____ 18. Encourage the use of the least invasive procedures possible.
- _____ 19. Discuss whether there are any new diagnoses, orders, or recommendations.
- _____ 20. Discuss the need for the healthcare provider to write new orders for medications, instructions for treatments or monitoring required, and any other recommendations or orders necessary for the management of the health issue on the provided healthcare visit/consultation form.
- _____ 21. Discuss the reason for any new medications and whether there are special instructions related to the use of the medication, including what times to give the medicine, how to give the medicine, and any anticipated side effects.
- _____ 22. Discuss when any new medications should begin.



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- _____ 23. Make sure that any medications which are to be stopped have specific orders for the discontinuation.
- _____ 24. If medications are discontinued, make sure these are marked as discontinued, including the date, and then packaged to be returned to the pharmacy.
- _____ 25. Discuss whether any monitoring/observation is necessary and what would prompt a call or follow up appointment to the healthcare provider.
- _____ 26. Discuss whether any follow up procedures or appointments are necessary.
- _____ 27. Ask how the results of any tests will be obtained and/or communicated.
- _____ 28. Make sure all instructions, recommendations, and orders are written on the healthcare visit/consultation form.
- _____ 29. Read orders and recommendations back to the healthcare provider to make sure they are legible and understood.

Checking out

- _____ 30. Schedule any follow up appointments, tests, or procedures as advised before leaving the office.
- _____ 31. Make arrangements for payment or reimbursement as needed.

